⊞⊞Special Contacts - For State Use Only

Clicking the Special Contacts button will allow you to view, add, or change information for contact people other than the Primary Contact person listed on the Basic Info tab. This feature allows you to put in more than just a phone number/email address for a contact person like you would do on the 'Contacts' tab. These contacts can also be used on Custom Letters.

Set Up a Special Contact

You must hit Edit on the main page and then click the ⊞⊞ button. The following screen will appear:

Choose the Contact Type from the drop-down list. Note: if additional contact types are needed please contact the INsite Help Desk.

Enter the Name, Address, and Phone Number info for the Contact.

Only one contact of each type can be added.

Click 'Exit' and the info will get saved when you click 'Save' on the main provider screen.

Using Special Contact Info on Custom Letters

When you are creating a custom letter, you can add the Special Contact info to the letter by choosing the appropriate items from the field list:
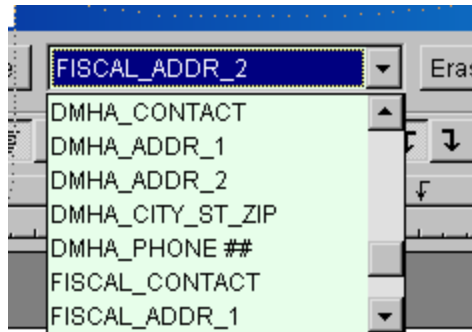
Currently there are two contact types - DMHA Liaison and Fiscal Contact. When adding the DMHA Liaison info, use the items in the list that begin with 'DMHA'. When adding the info for the Fiscal Contact, use the items in the list that begin with 'Fiscal'.

Reports

The Special Contact info will print on most reports. On the 'Who Provides What' reports such as the Pick List, the user can choose which type of contact to print on the report.